

CHAPTER 23 – PURCHASE REQUESTS

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23.A

Introduction to the Purchase Requests Window

The Purchase Requests window provides a convenient and efficient means by which stations or firefighting personnel can make equipment purchase requests. Users can choose from items that are pre-approved from specific suppliers, or non pre-approved.

23.B

Opening the Purchase Requests Window

The Purchase Request Window is accessed through the FirePro Menu.

FirePro 2 → Accounting → **Purchase Requests**



23.B.10

The Purchase Request Window

The Purchase Request Window allows you to easily create a purchase requisition to order equipment and supplies from your suppliers.

Purchase Requests

Pre-Approved Items Only Notes:

Number: 1234 Station: Stn 10 ~ Leslieville

Date: AUG 15 08 Budget: 2008 - Clearwater Regional Fire

Ordered By: Steve

Supplier: WFR Wholesale Fire & Rescue

Item	Qty	Price	Total
38mm 50' rubber hose	2	157.50	315.00
Account: 8-23-000-000-655-66 Capital - Fire Buildings			
Notes: <input type="checkbox"/> No PST <input type="checkbox"/> No GST			
65mm PG w/Ball Thunderfog	2	750.00	1,500.00
Account: 8-23-000-000-800-85 Capital - Transfer to Reserves			
Notes: <input type="checkbox"/> No PST <input type="checkbox"/> No GST			

1815.00 PST: 0.00 GST: 0.00 Total: 1815.00

Received: AUG 15 08 Approved By: Steve

Buttons: Find, Next, Previous, Add, Edit, Print, Delete, Approve, Receive, Cancel, OK

Purchase Request Window Fields

PRE-APPROVED ITEMS ONLY LABEL

This label, shown at the top of the screen, designates this complete purchase request as containing pre-approved items. The "Non Pre-Approved Items Only" label will be present when a purchase request has been designated as consisting of only non pre-approved items.

NUMBER

This is the Purchase Request Number. The field is searchable, but each purchase request does not require a unique number, so it can be left blank, or duplicate Purchase Request Numbers can be used.

The Number field is optional. To turn it on or off, see:

 **20.C.60**

DATE

This is the date that the purchase request was created.

BUDGET

If you are using the "Debit the Budget when Items are Received" option, FirePro will automatically create an Account Transaction and debit the funds from the appropriate account when a Purchase Request is marked "Received". The Budget List allows you to select which Budget the Account Transaction will be applied to.

To set up the "Debit the Budget when Items are Received" option, see:

 **20.C.60**

SUPPLIER

Suppliers are chosen from a drop-down list. This list is created in the Contact Manager window using the contacts that have been specified as Suppliers. Only one Supplier can be entered for each Purchase Request. Changing the Supplier when entering a Purchase Request for Pre-Approved items will clear all items from the Item List. [See **27.C**]

ITEM

If items are pre-approved, they are chosen from the list for that supplier. This list is created in the Pre-approved Suppliers window. [See **23.F.10**]
Non pre-approved items can be entered directly into this field.

PRICE

Pre-approved items are automatically priced and cannot be changed unless the As Per Budget check box has been checked in the Pre-Approved Suppliers window. [See **23.F.10**] Non pre-approved prices can be inserted straight into this field.

ACCOUNT NUMBER

Account number is chosen from a drop-down list.

The account numbers can be edited by going to the Account Names List:



20.10

No GST, No PST

Specify by item if these taxes are not required. GST and PST will be reflected in the Total at the bottom right of the Purchase Requests window.

To enter the percentages that apply to your province go to:



30.C

23.D

Purchase Request Window Buttons

23.D.10



Clicking on the Add button will produce a dialogue box that will ask you whether your request will consist of pre-approved or non pre-approved item(s). As you tab down the page, the purchase request will continue to provide space for as many items as required. Note that only one supplier can be entered per purchase request.

23.D.20



During an edit, supplier information cannot be changed, but items can be added to the Purchase Request. To remove one item from the request, delete either the quantity or the description of that item. For information regarding deleting an entire request [See **20.D.3**].

23.D.30



The Delete Button allows you to delete Purchase Requests that are **Not Approved** only.

To delete Approved Purchase Requests, go to Maintenance→Purge Old Data→Purchase Requests [See  **70.15**]

23.D.35



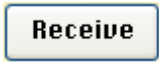
Clicking on the Approve button will activate the "Approved By" field on the bottom of the screen. Once a Purchase Request has been approved, it can no longer be edited or deleted.

The Delete and Approve buttons will only be present for the Master User or for anyone who has been marked with Officer Status for purchase requisitions on the Password screen.



70.C

23.D.50



The Receive Button allows you to mark Purchase Requests as "Received".

You must have the "Show Received Date" flag in the Set-up→Custom Settings→Accounting Tab turned on to use the Receive button.

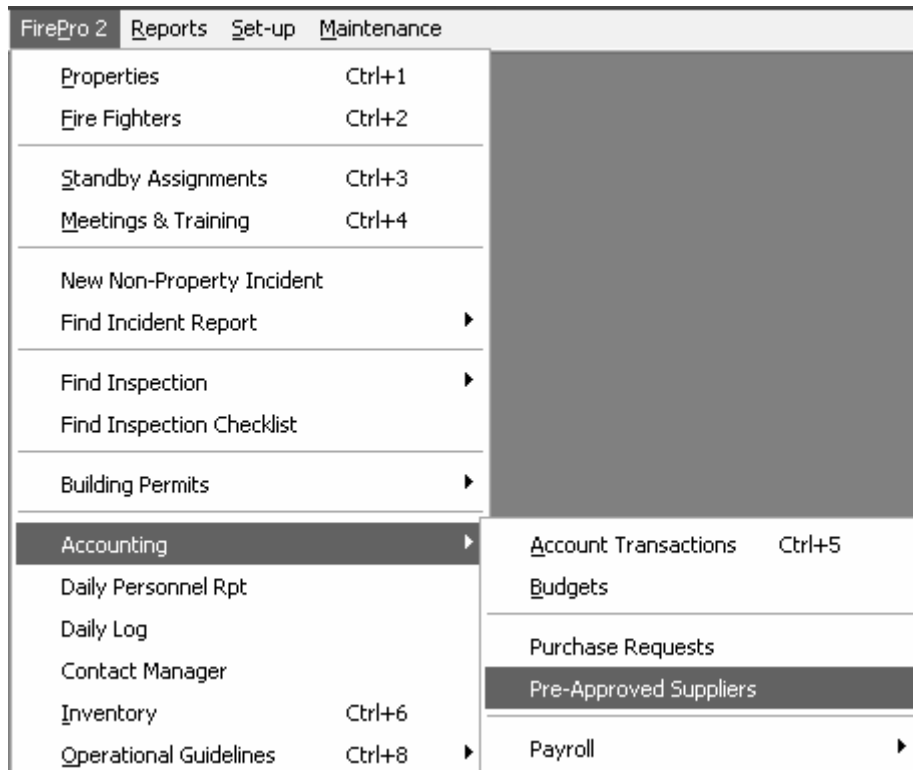
When you click on the Receive button, you will be asked to enter a "Received Date".

If you have the "Debit the Budget when Items are Received" flag turned on, FirePro will automatically create an Account Transaction for each item on the Purchase Request. All Account Transactions created this way will have a red "Created from Purchase Request" button on them.

Fire Pro Menu Items for Purchase Requests

Setting up Pre-Approved Suppliers and Items is done through the Pre-Approved Suppliers & Items window that is accessed through the FirePro menu.

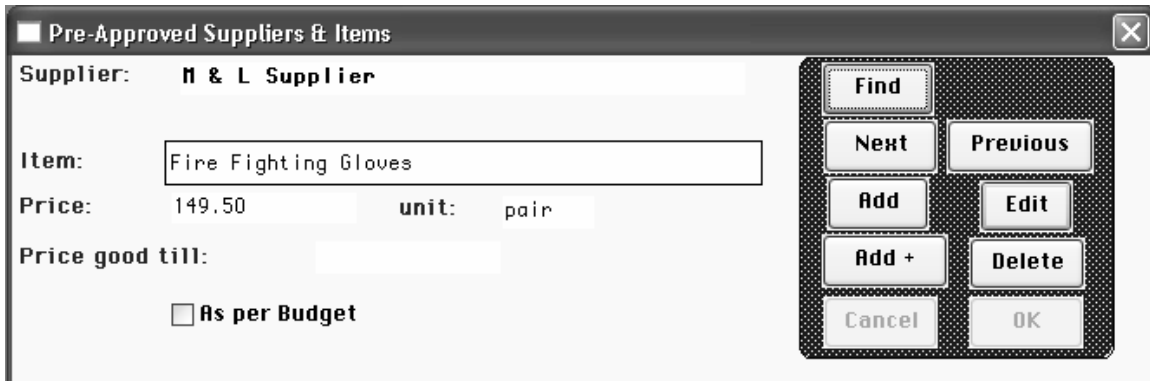
FirePro→Accounting→Pre-Approved Suppliers



23.F.10

Pre-Approved Suppliers and Items Window

The Pre-Approved Suppliers & Items window is accessed through the FirePro menu (**23.F**)



Supplier: M & L Supplier

Item: Fire Fighting Gloves

Price: 149.50 unit: pair

Price good till:

As per Budget

Find, Next, Previous, Add, Edit, Add +, Delete, Cancel, OK

The Pre-Approved Suppliers & Items window allows you to Add or Edit Pre-Approved items from suppliers on the Approved Suppliers (**27.C**) list.

SUPPLIER

Suppliers are chosen from a drop-down list. This list is created in the Contact Manager window using the contacts that have been specified as Suppliers. [See **27.C**]

ITEM

The name of the item (this is an open field that you can enter any item description in)

PRICE

The price per unit (ie: if an item is sold in cases only, this could be the price per case, not the price per individual item within the case)

UNIT

Unit that the item is sold by – can be numbers or text (ie: one, pair, 2)

PRICE GOOD TILL

The date that the price is good until (ie: if you have received a specific quote that is only good for a pre-determined amount of time).

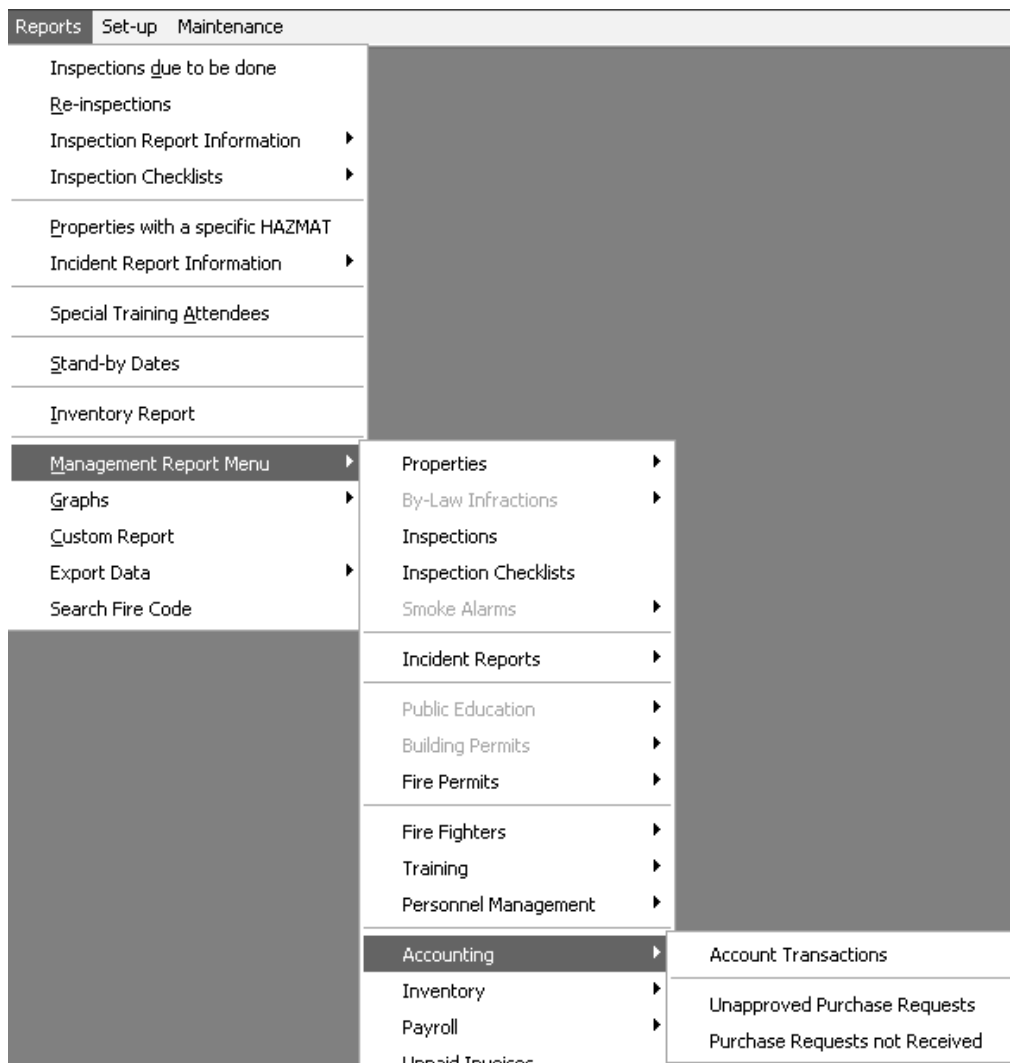
AS PER BUDGET

Opens up the price on the Purchase Request for this item.

Unapproved Purchase Requests

The Unapproved Purchase Requests Report produces a report detailing all unapproved purchase requests during a specified period, and is accessed through the Reports Menu. This is used by a senior officer to review the purchase requests and approve or deny them.

Reports → Management Reports → Accounting → **Print All Unapproved Purchase Requests**




Select the dates for the time frame you wish to review the Purchase Requests for to view a summary of outstanding requests. You may then print just one of the requests or print all from this list by clicking "Print One" or "Print All".

Date	Station	Ordered By	Notes
JAN 8 06	1	Skip	
JAN 12 06	2	Suzy Admin	

Print One Print All

Note:

The report prints the same as  **23.R.10**.
 If you "Print All", you will have multiple pages – each one with a single purchase order.

 **23.R.30**

Purchase Requests not Received

This report will generate a list of all Purchase Requests which have been Approved but not Received. Select the date range that you want to search, then hit "OK". A list of non-received Purchase Requests will appear.

Date	Station	Ordered By	Notes
AUG 7 08	30	Steve Scanland	
JUL 15 08	50	Nordegg Fire Hall	
JUL 31 08	50	Steve Scanland	
AUG 5 08	50	Steve Scanland	
JUL 3 08	90	Cammie Laird	
AUG 5 08	90	Steve Scanland	
AUG 5 08	90	Steve Scanland	
AUG 7 08	90	Cammie Laird	

Print One Print All

Click on any item in the list to go directly to the non-received Purchase Request